## Job Title: Budget and Research Manager

**Department:** Finance

**Immediate** 

**Supervisor:** Finance Director

<b>Origination Date:</b>	07/01/2001
<b>Revision Date:</b>	007/01/2012
Job Grade	611
FLSA Status	Exempt

#### **BRIEF DESCRIPTION OF THE JOB:**

Provides management oversight and direction for the sales tax audit, internal audit, business registration and budget office functions within the Finance Department. Duties included but are not limited to administrative and technical support including financial planning, budget preparation and control, policy analysis, program evaluations, economic impact analysis and project management.

#### **ESSENTIAL FUNCTIONS:**

This information is intended to be descriptive of the key responsibilities of the position. The following examples do not identify all duties performed by any single incumbent.

	Physical Strength Code	ESSENTIAL FUNCTIONS
1	S	Performs oversight, technical support and direction for the budget office functions within the Finance Department.
2	S	Performs financial planning by developing City financial policies, preparing revenue/expense forecasts, preparing quaterly financial status reports, performing cost benefit analysis, preparing financial plans, coordinating information for bond consultants, directing special planning and research projects, preparing and presenting staff reports, performing financial analysis, and providing feedback.
3	S	Assists with budget preparation and control by preparing budget guidelines, conducting budget training, maintaining the integrety of the budget database, overseeing the development of the City's Budget Book, reviewing budget requests, preparing budget recommendations, preparing and presenting budget allocations, monitoring execution, and recommending adjustments as needed.
4	S	Monitors financial activities and acts as a departmental resource by assessing the fiscal impact of state and federal policies, assisting departments with business and strategic plans, providing assistance to City departments on financial issues, and advising management of department operational matters.
5	S	Manages organizational projects assigned to the Finance Department by developing timelines, 10% identifying the necessary resources, facilitating public meetings, conducting training sessions, presenting updates to the City Council, developing alternative strategies, preparing recommendations, and implementing the chosen action plan.
6	S	Supervises department staff to ensure compliance and implementation of various administrative functions and financial activities. Also supervise staff by coaching, mentoring, evaluating, hiring, and counseling staff.

	Physical Strength Code	ESSENTIAL FUNCTIONS
7	S	Oversees the department's implementation and design of various databases, including budget entry and tracking, financial modeling and financial forecasting. Works with outside vendors to develop or update the department's various automated systems.
8	S	Prepares multi-year financial plans including maintaining and updating the City's financial model for both operating and capital improvement plans. Promotes consistency of multi-year financial plans and annual budgets. Provides analysis of cost of service models and rate studies for various activities.
9	S	Oversees budget preparation and the Integrated Planning & Budget team by planning budget guidelines and instructions, reviewing departmental budget requests and recommendations, preparing budget proposals, monitoring departmental budget execution, recommending budget adjustments and linking City/Department Strategic Plan to budget.

Budget and Research Manager: Finance Page 2

## JOB REQUIREMENTS:

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	JOB REQUIREMENTS
Formal Education / Knowledge	Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four years of college resulting in a Bachelor's degree or equivalent.
Experience	Minimum five years experience in a related field.
Certifications and Other Requirements	Valid Driver's License
Reading	Work requires the ability to read at college level.
Math	Work requires the ability to perform general math calculations at a college level.
Writing	Work requires the ability to write at college level.
Managerial	Complex – Work requires managing and monitoring work performance of a division including evaluating program/work objectives and effectiveness, establishing broad organizational goals and realigning work and staffing assignments for the department.
Policy / Decision Making	Significant - The employee normally performs the duty assignment according to his or her own judgment, requesting supervisory assistance only when necessary. Projects and daily work are managed with little oversight, however special assignments and significant work products may be reviewed upon completion. Typically positions in this category are supervisor to mid-management jobs.
Budget Responsibility	Significant – Has responsibility for final approval of at least one division budget and presents the budget(s) to Senior Management. Is authorized to approve division budgeted expenditures for both staff and resources up to the amount that requires the approval of Senior Management.
Technical Skills	Comprehensive Application - Work requires advanced skills and knowledge in approaches and systems, which affect the design and implementation of major programs, solutions for highly complex issues, and/or processes organization-wide. Independent judgment and decision-making abilities are necessary to apply technical skills effectively.
Interpersonal / Human Relations Skills	Moderate - Interactions at this level typically result in recommendations regarding policy development, changes in policy, and implementation of policies. Interactions at this level are typically concerned with providing communications at higher levels of organizational operations and may utilize activities such as evaluating customer satisfaction, developing cooperative associations, and allocating resources to improve work operations, work quality, overall achievement of organizational goals and objectives, and customer satisfaction.

Budget and Research Manager: Finance

### **Physical Demands**

**Frequency Code Scale** 

N = Never	R = Rarely	O = Occasionally	F = Frequently	C = Constantly
Never occurs	Less than 1 hour/week	Up to 1/3 of the time	From $1/3$ to $2/3$ of the time	2/3 or more of the time

Physical Demand	Frequency Code (Mark only one)	Description: (Check all that apply)	Physical Demand	Frequency Code (Mark only one)	Description: (Check all that apply)
Standing	□ N □ R ⊠ O □ F □ C	<ul> <li>☑ Making presentations</li> <li>☑ Observing work site</li> <li>☑ Observing work duties</li> <li>☑ Communicating with co-workers</li> </ul>	Pushing/ Pulling	□ N □ R □ O □ F □ C	<ul><li>☑ File drawers</li><li>☐ Equipment</li><li>☐ Tables and chairs</li><li>☐ Hoses</li></ul>
Fine Dexterity	□ N □ R □ O ⊠ F □ C	<ul><li>☑ Computer keyboard</li><li>☑ Telephone keypad</li><li>☑ Calculator</li><li>☐ Calibrating equipment</li></ul>	Climbing	□ N □ R □ O □ F □ C	⊠ Stairs     □ Ladders     □ Step stools     □ Onto equipment
Walking	□ N □ R ⊠ O □ F □ C	<ul><li>☒ To other departments/offices</li><li>☒ Around work site</li></ul>	Vision	□ N □ R □ O □ F ⊠ C	<ul><li>☒ Reading</li><li>☒ Computer screen</li><li>☐ Driving</li><li>☒ Observing work site</li></ul>
Lifting	□ N ⊠ R □ O □ F □ C	<ul><li>☑ Supplies</li><li>☐ Equipment</li><li>☑ Files</li></ul>	Foot Controls	□ N ⊠ R □ O □ F □ C	<ul><li>☑ Driving</li><li>☐ Operating heavy equipment</li><li>☐ Operating Dictaphone</li></ul>
Carrying	□ N ⊠ R □ O □ F □ C	<ul><li>☑ Supplies</li><li>☐ Equipment</li><li>☑ Files</li></ul>	Balancing	⊠ N □ R □ O □ F □ C	☐ On ladders ☐ On equipment ☐ On step stools
Sitting	□ N □ R □ O ⊠ F □ C	☑ Desk work ☑ Meetings ☐ Driving	Bending	□ N ⊠ R □ O □ F □ C	<ul><li>☒ Filing in lower drawers</li><li>☒ Retrieving items from lower shelves/ground</li><li>☐ Making repairs</li></ul>
Reaching	□ N ⊠ R □ O □ F □ C	<ul><li>☒ For supplies</li><li>☒ For files</li></ul>	Crouching	□ N ⊠ R □ O □ F □ C	<ul><li>☒ Filing in lower drawers</li><li>☒ Retrieving items from lower shelves/ground</li></ul>
Handling	□ N □ R □ O ⊠ F □ C	□ Paperwork     □ Monies	Hearing	□ N □ R □ O ⋈ F □ C	⊠ Communicating via     telephone/radio, to     co-workers/public     □ Listening to equipment
Kneeling	□ N ⊠ R □ O □ F □ C	☐ Filing in lower drawers ☐ Retrieving items from lower shelves/ground	Twisting	□ N □ R ⋈ O □ F □ C	<ul><li>☑ From computer to telephone</li><li>☐ Getting inside vehicle</li></ul>
Crawling	⊠ N □ R □ O □ F □ C	☐ Under equipment ☐ Inside attics/pipes/ditches	Talking	□ N □ R □ O ⊠ F □ C	☑ Communicating via telephone/radio, to co-workers/public
Other		(Explain)	•	•	,

Budget and Research Manager: Finance Page 4

<b>Physical Demands (continue</b>	ed)							
Machines, Tools, Equipmen	t and Work	Aids:						
Telephone, fax machine, copier, calcula	ator.							
Computer Equipment and S	Software:							
Personal computer, printer, scanner, pa		software.						
1 71 7 71								
Environmental Easters								
Environmental Factors:  Environmental Condition	ons	Never	Seasonally	Several T	imes	Several Ti	mes	Daily
	0113	INCVCI	Seasonarry	Per Mo		Per Wee		Duny
Extreme temperature		[C]						
(heat, cold, extreme temp. changes f work)	rom outside	X						
Wetness and/or humidity		×						
(bodily discomfort from moisture) Respiratory hazards			_					_
(fumes, gases, chemicals, dust and d	irt)	X						
Noise and vibration		X			П			
(sufficient to cause hearing loss) Physical hazards			_			_		_
(high voltage, dangerous machinery	, aggressive							
prisoners, patients – <u>not customers</u> )								
Health and Safety Condition	ns:							
Health and Safety Conditions	N = Never	R = Rarel		ccasionally		Frequently		Constantly
	Never	Less than		r more of		n 1/3 to 2/3		or more of
Mechanical hazards	occurs	hour per we	eek th	e time	Ol	the time	1	the time
Chemical hazards	$\boxtimes$							
Electrical hazards		X						
Fire hazards		X						
Explosives	$\boxtimes$							
Communicable diseases								
Physical danger or abuse		×						
Other (specify)								
Primary Work Location:  Office Environment  Warehouse Shop Vehicle Recreation Centers/Neighborhood Outdoors Other (Specify)  Protective Equipment Requirement								
N/A								

### **Job Demands**

#### **Overall Strength Demands:**

	Overall Strength Demands
☐ Sedentary	Exerting up to 10 pounds occasionally or negligible weights frequently; sitting most of the time.
⊠ Light	Exerting up to 20 pounds occasionally, 10 pounds frequently, or negligible amounts constantly <u>AND/OR</u> walking or standing to a significant degree.
☐ Medium	Exerting 20-50 pounds occasionally, 10-25 pounds frequently, or up to 10 pounds constantly.
☐ Heavy	Exerting 50-100 pounds occasionally, 25-50 pounds frequently, or from 10 up to 20 pounds constantly.
☐ Very Heavy	Exerting over 100 pounds occasionally, 50-100 pounds frequently, or from 20 up to 50 pounds constantly.

### **Non-physical Demands:**

Non-physical Demands	Frequently	Occasionally	Rarely	Never
Time Pressures		×		
Emergency Situations		×		
Frequent Change of Tasks		×		
Irregular Schedule/Overtime			$\boxtimes$	
Performing Multiple Tasks Simultaneously	×			
Working Closely with Others as Part of a Team	X			
Tedious or Exacting Work	×			
Noisy/Distracting Environment		×		
Other (Describe below.)				

#### **EXPECTED BEHAVIOR:**

#### Manager/Supervisor – Expected Behavior

The incumbent is expected to embrace, support, and promote the City's core values, beliefs, and culture, which include but are not limited to the following:

- Be positive. Do not participate in gossip or allow gossip or negative comments
- Make time for your employees.
- Maintain confidentiality
- Ensure work plans are prepared and communicated to employees at the time of hire and subsequent dates.
- Ensure evaluations in your area are turned in on time, and are fair and accurate reflections of the work performed for the entire evaluation period.
- Ensure all new employees are trained and mentored
- Prepare career plans. Ensure tools/resources are available for employees to achieve goals
- Walk the talk be an advocate for the Goodyear culture
- Make communication within your department a top priority
- Encourage positive feedback
- Be accountable submit responses to all requests for information by due date and meet deadlines.
- Support a learning environment
- Be on time for all meetings
- Be a champion of the cities policies and procedures and the classification and compensation program.
- Create and implement ethical standards for your worksite
- Respond to personnel issues immediately
- Ensure employees are allowed to participate ion teams and have time to do so
- Prepare and update standard operating procedures, and departmental operation plans annually.
- Ensure that your employees have the necessary resources they need to be successful within budgetary constraints.
- Be accountable for monthly/annual budget expenditures and be fiscally responsible
- Monitor department accomplishments related to performance indicators
- When wrong, state so
- Discussing and planning should be followed up with action
- Let common sense prevail
- Motivate your employees provide positive feedback
- Be visionary anticipate issues
- Mentor and build internal capacity in order for the employees to be able to compete
- Support organizational change
- Support the City's values and mission
- Establish and maintain positive and effective working relationships with co-workers, supervisors, subordinates, contractors, and vendors.
- Understand and interpret City policies and procedures, and make rational decisions/ recommendations in accordance with established policy.
- Work in a safe manner and report unsafe activities and conditions. Follow the City-wide safety policy and practices and adhere to responsibilities concerning safety prevention, reporting, and monitoring. Safety is everyone's responsibility. Make it a critical part of the day to day operations
- Encourage teamwork and participation by all employees

- Lead by example
- Provide outstanding customer service to internal and external customers

These traits are not basic job requirements but are expected behavior. Other duties and responsibilities will be performed as assigned.

#### **SIGNATURES—REVIEW AND COMMENT:**

I have reviewed this job analysis and its attachments and find it to be an accurate description of the demands of this job.

	Signature of Employee	Date
Job Title of Supervisor	Signature of Supervisor	Date
ob Title of Department Director	Signature of Department Director	Date
ents:		

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required of personnel so classified in this position. This job description is subject to change as the needs and requirements of the job change.